

Consultation in Action: Five Steps to Success

1. *Requesting Assistance*

This is as easy as a telephone call, letter, or e-mail to your state's Consultation Project Office. You can find your state's Consultation Project Office address and phone numbers at the bottom of this page.

In response, the Consultation Project Manager will determine the priority of your request for services according to:

- The nature of your worksite problem - "imminent danger" situations or hazards prioritized at the federal or state level for action take precedence.
- Your worksite size and industry category - priority is given to small- to medium-size employers (fewer than 250 employees at a worksite or fewer than 500 corporate-wide) in high-hazard industries.
- The type of consultation service you desire - an onsite hazard survey or another service that may be conducted off-site (e.g., safety and health review of proposed or new production processes, educational workshop delivered to groups of employers and workers).

The Project Manager will assign a consultant to your request who will contact you to:

- Set up a visit date based on the priority assigned to your request, your work schedule, and the time needed for the consultant to prepare adequately to assist you.
- Determine the scope of your visit to see if you want all working conditions and the site's entire safety and health program included in the consultation or if you want to limit it to a discussion of specific problems.

The consultant will remind you that if he or she observes hazards that are outside the scope of the request, he or she must inform you, and you must correct any hazards that OSHA deems serious or that pose an "imminent" danger to employees.

2. *The Opening Conference*

When the consultant arrives at your worksite for the scheduled visit, he or she will:

- Explain the purpose, scope, and procedures of the visit. Specific conditions that require your consent before the visit can proceed include:
 - The consultant's right to interview individual employees and to speak with workers at their workstations;
 - Your requirement, at a unionized worksite, to afford employee representatives the opportunity to participate fully in the consultation visit, from start to finish;
 - Your requirement to post a list of identified hazards; and
 - Your obligation to protect employees in the event that serious hazardous conditions are identified.
- Encourage you to allow employee participation in the consultation visit. OSHA's experience with thousands of worksites has demonstrated the value of employee involvement in workplace safety and health.
- Review your establishment's written safety and health program, if one exists.
- Review injury and illness logs, if they are available.

3. *The Walkthrough*

The consultant will walk through your worksite as he or she either studies your entire operation or focuses on specific conditions or hazards for which you have requested assistance. The consultant will confer with employees during the survey process. If your worksite is unionized, an employee representative will accompany the consultant in the walkthrough. The walkthrough will address hazards covered by OSHA standards and also those not covered by current federal or state OSHA standards that pose a risk to safety or health. In the rare occurrence

that the consultant should find an "imminent danger" at your worksite, you must take immediate action to protect all affected workers.

In a full-service consultation, the consultant will conduct a wall-to-wall review of your company operations from a safety and health perspective. During the walkthrough, he or she will assess various health and safety issues, including but not limited to:

- The building, floors, and stairs for physical hazards;
- The functionality and placement of exits and fire protection equipment;
- The space layout in aisles and between machines;
- The containment of electrical and mechanical hazards;
- The controls on worker exposure to occupational hazards, including toxic and corrosive substances, and especially air contaminants;
- The availability and functioning of all necessary personal protective equipment and whether employees know how to use and care for the equipment;
- Worker exposure to noise, vibration, lighting or other environmental factors;
- Work practices, including general housekeeping; and
- Use and maintenance of hand and portable power tools, as well as forklifts and other heavy equipment.

During the walkthrough, the consultant:

- Will note problems and discuss their prevention and control;
- May provide, at your request, on-the-spot education and training for your employees and supervisory personnel on safety and health items (e.g., equipment maintenance, repair, and inspection; first-aid and emergency procedures; hazard reporting procedures);
- Will offer advice and technical assistance for addressing identified hazards within the framework of an effective safety and health management system; and
- Will provide, at your request, follow-up assistance to help you develop or improve a worksite safety and health management system that addresses your site's unique needs and conditions.

4. The Closing Conference

Following the walkthrough, the consultant will meet with you in a closing conference. This session offers the consultant an opportunity to:

- Recognize safety and health measures that are already in place at your worksite and that are particularly effective.
- Discuss any work practices that warrant improvement.
- Identify hazards and the measures needed to eliminate or correct them. If the consultant finds a hazard that is classified as "serious" under OSHA's criteria, he or she will work with you to develop a mutually acceptable plan and schedule to eliminate or control the hazard. During this time, the consultant will encourage you to advise all affected employees of the hazard(s) and provide adequate interim protective measures.
- Make suggestions about worker training, work practices, an action plan for safety and health, ways to improve your current safety and health management system or how to develop one if you have none in place.
- Recommend other sources for specialized technical help if required.

The closing conference provides you the opportunity to hear and respond to the findings of the walkthrough in an atmosphere of confidentiality and consultation. You can openly discuss problems, possible solutions, required actions and their time frames for implementation.

5. Hazard Correction After the Visit

Following the closing conference, the consultant will send you a written report that does the following:

- Explains the findings of the visit.
- Provides a List of Hazards that must be posted in view of all employees.
- Confirms any correction timeframes to which you have agreed.
- Suggests means or approaches for eliminating or controlling hazards.
- Recommends actions for making your safety and health program more effective.

Because a consultation visit can go beyond the usual physical survey of workplace violations of federal or state OSHA standards, the consultant may point out work practices not yet covered by OSHA standards that could cause illness or injury and may recommend ways to correct them.

The consultant may decide that a follow-up visit to your worksite is needed to ensure that any required corrections have been made or to provide continuing assistance. That continuing assistance may range from offering technical assistance in controlling an identified hazard to working directly with you and your management team to develop and implement a safety and health management system.

You, of course, are free to contact the consultant for assistance anytime.